

# Overview – Solution Package

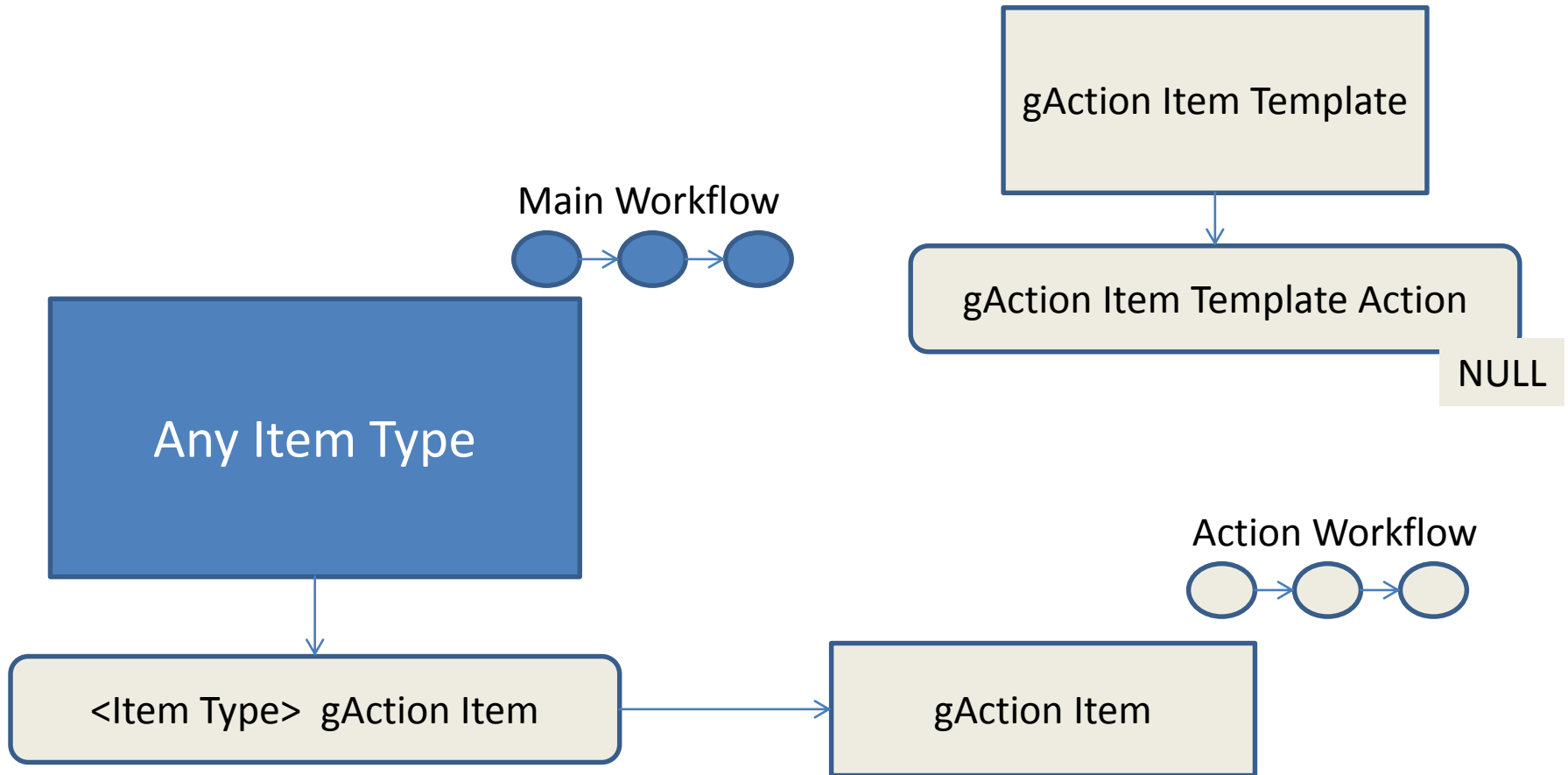
## „generic Action Item v1-2 “(A10+11)

- Many times when creating a custom workflow and its form in Aras Innovator or when extending existing processes there can be a requirement to have sub-workflows to follow-up on additional actions or “ToDo’s”. Of course, these sub-workflows then have to be created “ad-hoc”. A common way here is to add a relationship listing actions to do and there point to an item with a workflow, so it shows you the InBasket of an action’s owner.
- This solution package will exactly address this. The new “generic Action Item” type is designed to be re-used whenever you want additional Actions listed on a process’ form. (this idea was inspired by the existing community solution for “meeting minutes” on projects)
- An example how this additional functionality can be re-used, once imported, is also part of this package. Adding an “Action Items” tab to the standard “Express DCO”
- A second new item type „gAction Item Template“ is used to allow managing a set of „standard Actions“ (by Administrator for example) that will „instantiate“ triggered from your process on which you added the „Action Items“ tab. (Trigger can be a custom action, like in the example, or by custom logic using the Aras Innvator API)

# Installation

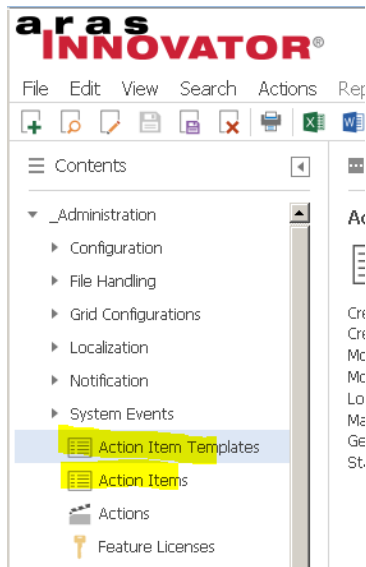
- Use the Aras PackageImportExportUtilities to import the package „generic Action Item vX “
  - There are multiple import cycles you have to do in exactly this order.
  - Log in as „admin“ and use „merge“ option for all steps
  - Folder: 1-Import - Generic Action Item Functions
    - Import: “generic Action Item”
  - Folder: 2-Import - Example on DCO (optional)
    - 1-Import: „generic Action Item - on Express DCO”
    - 2-Import: “PLM” (adds new action to DCO)
- You MUST use the „Merge“ option.
- Done

# Data Model

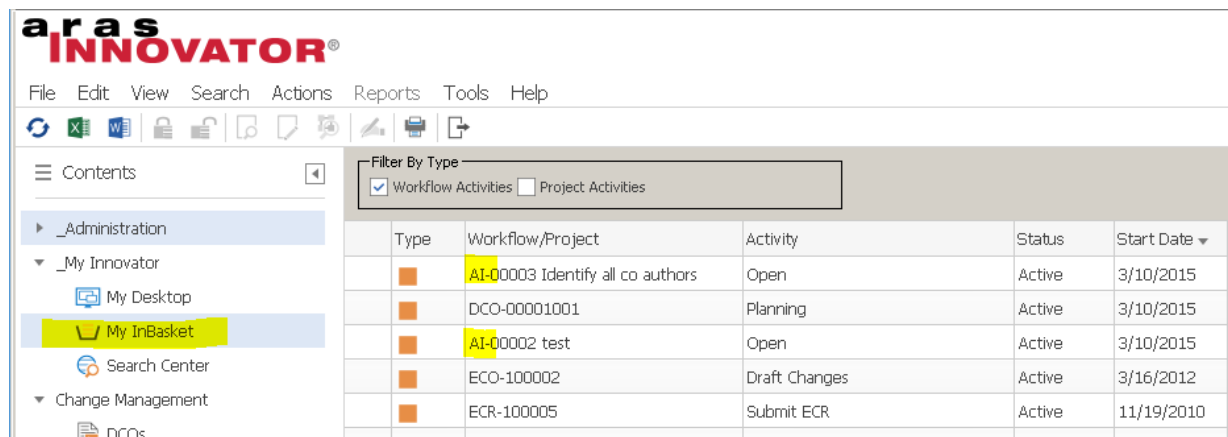


# Working with Action Items

Access to Action Items and Templates for „Administrators“



Access to Action Items via InBasket for all users



# gAction Item – ItemType, Life Cycle Map, and Workflow Map

Use List „gAction Item Types“ to add your types

http://localhost - Action Item - AI-00002 Add more Action Items for each document owner once DCO is 'In Work' (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

**Action Item**

Type: Generic

Number: AI-00002

Created On: 3/10/2015 9:02:26 AM

Due Date: 3/12/2015

Prio: Medium

Status: Open

Description: Add more Action Items for each document owner once DCO is 'In Work'

Action Owner: Innovator Admin

Action Reviewers:

Closing Notes:

☒ Closing Notes Required

Closed On:

SignOffs

**Workflow History Report**

Item: AI-00002 Add more Action Items for each document owner once DCO is 'In Work'

Current Status is: Active

Started By: Innovator Admin

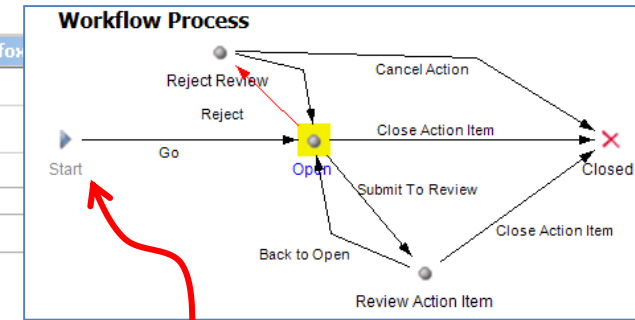
Started On: 3/10/2015 9:10:14 AM

Completed On:

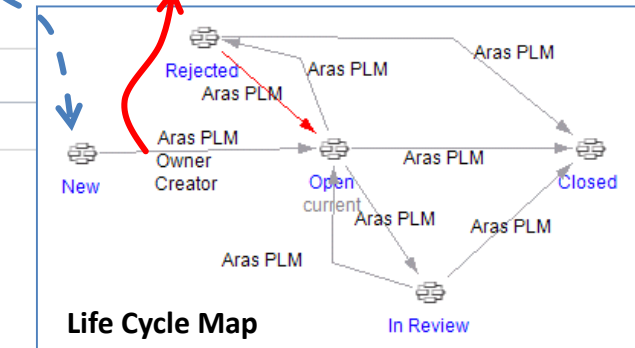
Activity	State	Assigned To	Completed By	How Voted	When	Comments
Open	Active	Innovator Admin		<a href="#">VOTE NOW</a>		

Ready

Aras Innovator



Transaction starts the workflow



# „gAction Item Template“

Templates must be promoted to „Active“ to activate.

Valid RelationshipType you added to your process

→ If set, instance of Action item will auto-promote to „Open“

http://localhost - Action Item Template - generic\_action Express DCO default Actions (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

**Action Item Template**

**Template Name**  
Express DCO default Actions

**Use With Process (ItemType Name)**  
Express DCO

**Add This Relationship To Process**  
[Express DCO gAction Item](#)

☐ Start Related Action

**Action Item Type**  
Generic

**Action Sub Type**

**Template Owner**  
[Administrators](#)

**Status**  
Active

**Template Actions**

Actions ▾ No Related + - X Excel Word Lock Link Refresh Undo Redo Hide Search Criteria

Pos	Priority	Description	Action Default Ow...	Action Default Revi...	Due Date Offse...	Closing Notes Req...
1	Medium	Add more Action Items for each document owner once DCO is 'In Work'	<a href="#">Owner</a>		2	<input checked="" type="checkbox"/>

Ready Items 1-1 of 1. Page 1 of 1 Aras Innovator

# Action Items Example on „Express DCO“

Sample logic adds Action Items from Template

Manually add „adhoc“ Action Items

Pos	Type	Status	Description	Owner [...]	Due Date [...]	Prio	Started On [...]	Closing Notes Requi...
128	Generic	Open	Add more Action Items for each document...	Innovator Admin	3/12/2015	Medium	3/10/2015 9:10:14 AM	<input checked="" type="checkbox"/>


Ready Items 1-1 of 1. Page 1 of 1 Aras Innovator

# Example Configuration: Express DCO Action Item Tab

http://localhost - RelationshipType - Express DCO gAction Item (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

RelationshipType



**Name**  
Express DCO gAction Item

**Label**  
Action Items

**Description**

**Source**  
**Source ItemType** ☐ Hide In All  
[Express DCO](#)

**Related**  
**Related ItemType** gAction Item

**Min Occurs**

**Max Occurs**

**Behavior**  
Float

**Grid View**  
Intermix

**On New Related Option**  
☐ Pick Only  
☒ Create Only  
☐ Pick & Create  
☒ Requires Related  
☐ Open Related Form

**General**  
☒ Auto Search  
Sort Order 512  
Default Page Size

**Paste Defaults**  
☐ Copy Permissions  
☐ Create Related

Must be set to always create new relationship that must have a new related item.